



AGRICULTURE AND FOOD AUTHORITY

QUARTER

4



BULLETIN
2024/2025

Our Crops, Our Wealth

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The Authority's quarterly e-bulletins provide data-driven insights on scheduled crops, drawing from all six AFA directorates to track performance, trends, and market shifts. They inform stakeholders, shape policy and guide strategic investment in the agricultural sector.

Coffee exports in April–June 2024/2025 grew by 7 percent in volume (15,748 MT) and 36 percent in value (USD 117.4 million), driven by high global prices, though 97 percent comprised unprocessed green coffee. Auction sales fell sharply to USD 23.2 million due to a recess, while Direct Sales rose to USD 4.6 million and expanded to more markets. Imports were mainly processed coffee from Brazil (19.96 percent), India (17.87 percent), and Rwanda (16.55 percent). Expanding value addition remains the key growth opportunity.

In the quarter under review, pyrethrum deliveries dropped 16.3 percent to 288,632 Kg due to poor planting material, while miraa exports to Somalia fell by 29.24 percent to 934,982 Kg under Ethiopian competition; imports from Ethiopia rose sharply by 20,353 Kg. Bixa seed output more than doubled to 406,567 Kg on favorable weather. Norbixin exports declined 23.9 percent to 10,280 Kg and bixin exports totaled 4,500 Kg, all to Brazil.

Kenya's nuts and oil crops exports in the quarter under review, surged to 12,787 MT worth KES 4.61 billion, led by macadamia nuts and crude rapeseed oil, alongside gains in sesame, cashew and coconut products. Imports, covering over 90 percent of edible oil needs, rose slightly in value to KES 25.61 billion, with palm oil dominant, sunflower oil surging and soybean oil declining due to higher local production.

In the reviewed quarter, cotton yields rose 20 percent to 153 Kg/acre, supported by better seed, inputs and extension services, though still trailing the national target. Sisal exports fell 9 percent to 5,415.50 MT and KES 1.12 billion on drought impacts and low global prices, with Grade UG dominating shipments to 23 markets.

Food crops trade in the quarter of April-June 2025 reflected a dual strategy, leveraging imports to cover seasonal and structural production deficits, while building domestic resilience in select crops. Climatic variability, lean-season supply gaps and shifting demand patterns significantly shaped trade flows.

Horticultural exports grew strongly in Q4 April-June 2025, rose by 18 percent in volume to 130,568 MT and 54 percent in value to KES 50.55 billion, with flowers and fruits driving nearly 90 percent of earnings. Imports declined by over 60 percent at 14,078 MT worth 1.89 billion, reinforcing the sector's export-led growth and import-substitution strategy.



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1.0 Coffee Industry Performance

Introduction

The April–June 2025 period saw a mixed performance in Kenya’s coffee sector, shaped by high global prices, seasonal market dynamics and shifts in trading channels. While auction volumes and values fell sharply due to the May–June recess, average prices rose significantly, reflecting strong international demand. Direct sales expanded both in volume and value, reaching diverse markets, while overall export earnings increased, driven largely by unprocessed green coffee. Imports remained modest, dominated by instant and green coffee from key producing countries.

1.1. Quarterly Highlights

- **Auction Sales:** 71,929 (50 Kg) bags equivalent to 3,596 MT worth USD 23.2 million were sold. This represents a 75 percent drop in volume and a 65 percent drop in value, but the average price increased by 42 percent to USD 322 (50Kg) bags due to high global prices. The drop was attributed to May–June auction recess.
- **Direct Sales:** 555,360 MT worth USD 4.6 million representing a 23 percent increase in volume and a 32 percent in value. Top counties that had direct sales: Nyeri (47 percent), Embu (16 percent), Kirinyaga (15 percent). Top direct sales by country of destination: USA, Switzerland, UK.
- **Exports:** 15,748 MT worth USD 117.4 million representing a 7 percent increase in volume and a 36 percent in value. The top three markets were USA, Korea, Belgium. 97 percent of the coffee exports comprised of unprocessed green coffee.
- **Imports:** 500 MT worth USD 4.0 million. Mostly instant coffee (60 percent) and green coffee (32 percent). Key origins: Brazil, India, Rwanda.

1.2. Auction Sales

During the April–June quarter of the 2024/2025 financial year, 71,929 bags (50 Kg each) of coffee equivalent to 3,596.47 MT were sold at the Nairobi Coffee Exchange, generating USD 23.17 million. The average auction price rose 42 percent year-on-year to USD 322.13 per 50 Kg, driven by strong international market prices. April recorded the highest trading volumes, while activity slowed sharply from mid-May due to the auction recess, resuming in early July. As a result, compared to the same period in 2023/2024, volumes fell 75 percent (from 14.86 MT), and values dropped 65 percent (from USD 67.56 million). For more details, refer to Table 1.



Table 1: Auction Performance April - June (2023/2024 & 2024/2025)

Month	2023/2024				2024/2025			
	Bags (50 Kg)	Volume (Kgs)	Value (USD)	Avg Price (USD/50Kg)	Bags (50 Kg)	Volume (Kgs)	Value (USD)	Avg Price (USD/50Kg)
April	137,573	6,878,663	34,231,874.30	248.83	63,526	3,176,280	20,241,498.84	318.64
May	69,248	3,462,376	13,760,742.98	198.72	8,404	420,192	2,929,307.18	348.57
June	90,475	4,523,730	19,565,750.92	216.26	0.00	0.00	0.00	0.00
Total	297,296	14,864,769	67,558,368.20	227.24	71,929	3,596,472	23,170,806.02	322.13

Source: AFA – Coffee Directorate

1.3. Direct Sales

Under the Crops (Coffee) (General) Regulations, 2019, Direct Sales refer to contractual arrangements between coffee growers (or their associations) and overseas buyers or local roasters for the sale of clean coffee under mutually agreed, legally enforceable terms.

In Quarter 4 of FY 2024/2025, 553.36 MT of coffee were sold through the Direct Sales Window, earning USD 4.61 million. The average price for the quarter was USD 415.13 per 50 Kg (USD 8.30 per Kg). Compared to the same period in 2023/2024, volumes increased by 23 percent, values by 32 percent, and average

prices by 7 percent, reflecting stronger grower participation in Direct Sales. The highest price recorded in the period was USD 800 per 50 Kg (USD 16 per Kg). for more details, refer to Table 2.

**Table 2: Direct Sales Performance April - June (2023/2024 & 2024/2025)**

Month	2023/2024			2024/2025		
	Volumes (Kgs)	Value (USD)	Avg Price (USD/50 Kg)	Volumes (Kgs)	Value (USD)	Avg Price (USD/50 Kg)
April	244,981.32	1,865,754.84	380.80	284,862.00	2,247,897.40	394.56
May	170,261.19	1,328,687.99	390.19	210,199.00	1,845,399.98	438.96
June	36,179.40	300,235.68	414.93	60,299.00	517,647.72	429.23
Total	451,421.91	3,494,678.51	387.07	555,360.00	4,610,945.10	415.13

Source: AFA – Coffee Directorate

1.3.1. Direct Sales by County

During the quarter, 13 counties participated in Direct Sales. Nyeri County led with 261.40 MT (47 percent share), earning USD 2.32 million. Embu ranked second with 91.17 MT (16 percent share, USD 0.77 million), while Kirinyaga placed third with 83.44 MT (15 percent share, USD

0.51 million). There were no sales in Murang'a and Tharaka Nithi in the quarter under review. For more details, refer to Table 3.

Table 3: Direct Sales Distribution by County (2023/2024 & 2024/2025)

No	County	2023/2024			2024/2025		
		Volumes (Kgs)	Value (USD)	% Share	Volumes (Kgs)	Value (USD)	% Share
1	Nyeri	73,634.11	703,465.09	16.31%	261,402.00	2,317,775.30	47.07%
2	Embu	19,581.26	240,772.50	4.34%	91,165.00	771,407.74	16.42%
3	Kirinyaga	166,278.85	1,321,721.87	36.83%	83,441.00	508,981.84	15.02%
4	Trans Nzoia	33,346.78	204,519.51	7.39%	56,249.00	477,301.12	10.13%
5	Baringo	23,371.21	137,429.90	5.18%	19,200.00	119,340.00	3.46%
6	Migori	0	0	0.00%	14,640.00	128,670.00	2.64%
7	Kiambu	42,349.61	274,423.54	9.38%	8,934.00	76,356.88	1.61%
8	Nandi	164.25	2,018.38	0.04%	8,186.00	91,983.00	1.47%
9	Nakuru	4,910.52	20,331.84	1.09%	4,170.00	49,706.40	0.75%
10	Kericho	0	0	0.00%	2,459.00	19,672.00	0.44%
11	Uasin Gishu	0	0	0.00%	2,395.00	23,082.00	0.43%
12	Machakos	0	0	0.00%	1,979.00	15,610.40	0.36%
13	Meru	0	0	0.00%	1,140.00	11,058.42	0.21%
14	Murang'a	86,580.81	584,949.21	19.18%	0.00	0.00	0.00%
15	Tharaka Nithi	1,204.51	5,046.66	0.27%	0.00	0.00	0.00%
Total		451,421.91	3,494,678.51	100.00%	555,360.00	4,610,945.10	100.00%

Source: AFA – Coffee Directorate

Direct Sales Distribution by County

TOTAL PRODUCTION

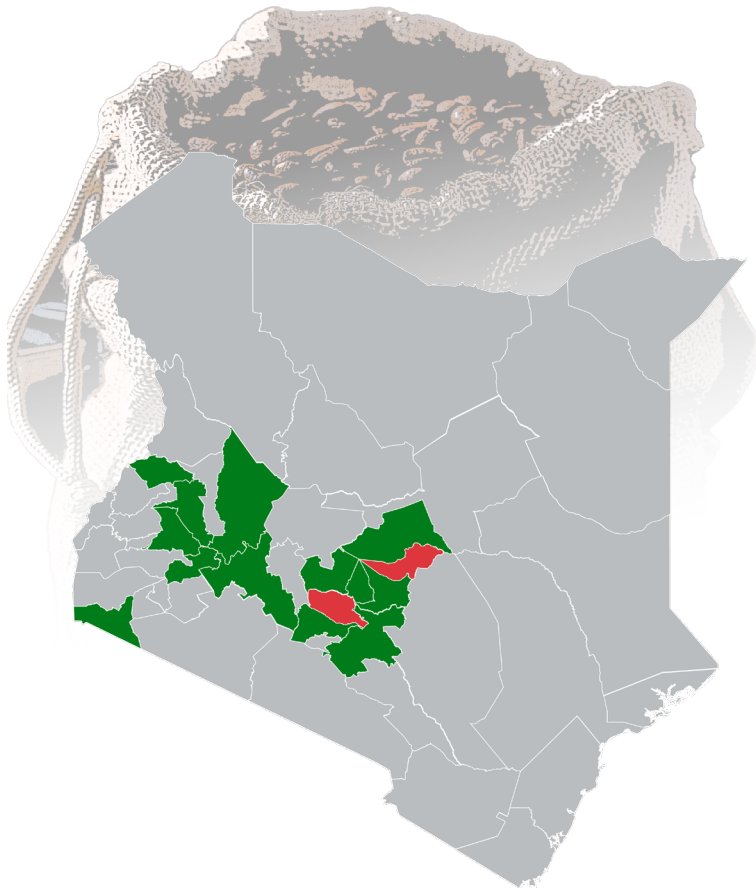
555,360 Kgs

TOP THREE COUNTIES

NYERI 261,402 KGS

EMBU 91,165 KGS

KIRINYAGA 83,441 KGS



1.3.2. Direct Sales

Destinations

The number of Direct Sales destinations grew from 8 in 2023/2024 to 19 in 2024/2025, reflecting expanded market outreach. The top three destinations by volume were:

- United States – 133.98 MT (24 percent share, USD 1.22 million)
- Switzerland – 120.61 MT (22 percent share, USD 0.82 million)
- United Kingdom – 90.01 MT (16 percent share, USD 0.79 million)

Other notable markets included the UAE (14

percent), Korea (5 percent), and Malaysia (5 percent). Several new destinations emerged, such as Kuwait, France, and Australia, indicating diversification beyond traditional European buyers.

The highest average price was recorded in Kuwait at USD 2,706.88 per 50 Kg, which is 3.5 times higher than the peak price in the same period of 2023/2024 (USD 606 in the USA). For more details, refer to Table 4

Table 4: Direct Sales Destinations April - June (2023/2024 & 2024/2025)

No	Destinations	2023/2024				2024/2025			
		Volume (Kgs)	Value (USD)	Avg Price (USD/50Kg)	% Share	Volume (Kgs)	Value (USD)	Avg Price (USD/50Kg)	% Share
1	United States of America	10,420.87	126,300.46	606.00	2.31%	133,982.00	1,223,378.03	456.55	24.13%
2	Switzerland	165,410.75	1,087,547.71	328.74	36.64%	120,611.00	818,346.28	339.25	21.72%
3	United Kingdom	167,218.74	1,301,710.13	389.22	37.04%	90,005.00	788,085.09	437.80	16.21%
4	United Arab Emirates	0.00	0.00	0.00	0.00%	80,100.00	655,806.60	409.37	14.42%
5	Korea	0.00	0.00	0.00	0.00%	29,280.00	203,928.00	348.24	5.27%
6	Malaysia	0.00	0.00	0.00	0.00%	27,460.00	195,700.20	356.34	4.94%
7	Germany	2,938.28	32,680.80	556.12	0.65%	18,891.00	170,784.60	452.03	3.40%
8	Netherlands	0.00	0.00	0.00	0.00%	16,954.00	148,098.00	436.76	3.05%
9	Spain	0.00	0.00	0.00	0.00%	9,660.00	98,193.40	508.25	1.74%
10	Australia	0.00	0.00	0.00	0.00%	6,900.00	75,581.40	547.69	1.24%
11	Singapore	0.00	0.00	0.00	0.00%	5,580.00	53,490.00	479.30	1.00%
12	Taiwan	0.00	0.00	0.00	0.00%	4,200.00	39,960.00	475.71	0.76%
13	France	0.00	0.00	0.00	0.00%	4,170.00	49,706.40	596.00	0.75%
14	Hungary	758.60	7,008.39	461.93	0.17%	2,587.00	26,335.40	508.99	0.47%
15	Japan	0.00	0.00	0.00	0.00%	2,340.00	32,100.00	685.90	0.42%
16	Finland	0.00	0.00	0.00	0.00%	1,200.00	9,600.00	400.00	0.22%
17	Saudi Arabia	0.00	0.00	0.00	0.00%	1,080.00	13,435.20	622.00	0.19%
18	Belgium	0.00	0.00	0.00	0.00%	240.00	1,920.00	400.00	0.04%
19	Kuwait	0.00	0.00	0.00	0.00%	120.00	6,496.50	2,706.88	0.02%
20	Denmark	11,113.16	133,590.01	601.04	2.46%	0.00	0.00	0.00	0.00%
21	Norway	70,190.30	668,411.10	476.14	15.55%	0.00	0.00	0.00	0.00%
22	South Korea	23,371.21	137,429.90	294.02	5.18%	0.00	0.00	0.00	0.00%
Total		451,421.91	3,494,678.51	387.07	100.00%	555,360.00	4,610,945.10	415.13	100.00%

Source: AFA – Coffee Directorate

1.4. Exports

In the quarter under review there were total exports of 15,748.35 MT in volume worth USD 117.40 million showing a rise by 7 percent in volume and 36 percent in value from same period 2023/2024, supported by high global coffee prices.

The top three export markets were the United States (15 percent), Republic of Korea (12 percent) and Belgium (11 percent). Exports were predominantly in unprocessed form, with 97 percent consisting of green coffee. April and May 2024/2025 saw a strong growth in both volume and value, but June experienced a notable decline, pulling down the quarterly growth rate. For more details, refer to Tables 5 and 6.



Table 5: Export Performance April - June (2023/2024 & 2024/2025)

Month	2023/2024		2024/2025	
	Volume GBE (MT)	Value (Million USD)	Volume GBE (MT)	Value (Million USD)
April	5,142.25	26.35	6,245.10	46.32
May	4,855.26	30.39	5,842.70	43.84
June	4,673.34	29.42	3,660.56	27.24
Total	14,670.85	86.16	15,748.35	117.40

Source: AFA – Coffee Directorate



Table 6: Export Destinations April - June (2023/2024 & 2024/2025)

No	Destination	2023/2024		2024/2025ww		% Share (2024/2025)
		Volumes GBE (MT)	Value (Million USD)	Volumes GBE (MT)	Value (Million USD)	
1	United States of America	2,166.31	14.57	2,422.41	19.86	15.38%
2	Korea, Republic Of	1,701.07	10.17	1,876.01	13.85	11.91%
3	Belgium	1,638.47	11.37	1,808.81	15.49	11.49%
4	Germany	1,686.01	10.30	1,709.84	14.03	10.86%
5	Sweden	763.46	3.96	769.54	5.39	4.89%
6	Norway	557.89	4.90	698.86	6.68	4.44%
7	Netherlands	480.68	2.49	465.99	3.39	2.96%
8	United King- dom	316.53	2.10	389.77	2.86	2.48%
9	Japan	334.40	2.46	363.96	3.35	2.31%
10	China	325.77	2.47	339.69	3.37	2.16%
11	Jordan	259.69	1.17	273.77	1.59	1.74%
12	Italy	189.31	0.93	173.21	1.27	1.10%
13	Spain	86.33	0.58	107.67	0.79	0.68%
14	France	85.87	0.38	107.18	0.52	0.68%
15	South Africa, Republic Of	53.21	0.31	67.12	0.42	0.43%
16	India	38.89	0.12	44.74	0.17	0.28%
17	Turkey	20.74	0.10	22.26	0.14	0.14%
18	Singapore	8.10	0.08	8.70	0.10	0.06%
19	Somalia	3.44	0.03	3.70	0.05	0.02%
20	Switzerland	1.30	0.01	1.39	0.02	0.01%
21	Others (36)	3,953.38	17.68	4,093.74	24.09	25.99%
Total	14,670.85	86.16	15,748.35	117.40	100.00%	

Source: AFA – Coffee Directorate

1.4.1. Exports by Form

In the quarter under review Kenya's coffee exports were overwhelmingly unprocessed (97.35 percent), with only 2.65 percent in value-added (processed) forms. Green Coffee (not roasted/decaffeinated) dominated exports, accounting for 97.28 percent of volume and 98.3 percent of total value.

Value-added coffee (roasted, decaffeinated, extracts) represented just 417 MT in total volume while Other, Coffee Roasted had a relatively high share within processed exports (1.45 percent), despite low value (USD 0.03 million). For more details, refer to Table 7.



Table 7: Exports by Form April-June (2024/2025)

Form	HS Code Description	Volume GBE (MT)	Value (Million USD)	% Share
Unprocessed	Green Coffee, Not Roasted or Decaffeinated	15,319.52	115.42	97.28%
	Green Coffee, Decaffeinated	10.25	0.00	0.07%
Processed	Coffee Roasted, Decaffeinated	9.36	0.09	0.06%
	Coffee Roasted, Not Decaffeinated	169.56	1.73	1.08%
	Other, Coffee Roasted	228.86	0.03	1.45%
	Extracts, Essences and Concentrates of Coffee	10.82	0.13	0.07%
Total		15,748.36	117.40	100.00%

Source: AFA – Coffee Directorate

1.5. Imports

In quarter under review total coffee imports by volume were 500.19 MT valued at USD 4.01 million (KES 520.96 million). Coffee imports had product Mix: Instant coffee (extracts, essences, concentrates) that dominated imports, accounting for 60.20 percent followed by green coffee at 32 percent.

The leading country of origin were Brazil (20 percent), India (18 percent), and Rwanda (17 percent), with a total of 21 source countries recorded. For more details, refer to Table 8 and 9.



Table 8: Imports for April - June (2024/2025)

Month	Volumes (Kgs)	Value (USD)	Value (Ksh)
April	115,342.32	1,085,714.91	141,142,938.45
May	175,190.05	1,469,452.49	191,028,823.42
June	209,660.06	1,452,251.24	188,792,661.66
Total	500,192.43	4,007,418.64	520,964,423.53

Source: AFA – Coffee Directorate

Table 9: Imports by Form April - June (2024/2025)

Form	HS Code Description	Net Weight (Kgs)	Value (USD)	Value (Ksh)	% Share
Unprocessed	Green Coffee, Not Roasted or Decaffeinated	162,508.30	840,003.14	109,200,408.44	32.49%
	Green Coffee, Decaffeinated	30.00	2,111.64	274,513.65	0.01%
Processed	Coffee Roasted, Decaffeinated	1,429.20	610.52	79,368.07	0.29%
	Coffee Roasted, Not Decaffeinated	106.24	38,598.71	5,017,832.65	0.02%
	Other, Coffee Roasted	35,000.64	6,363.70	827,281.20	7.00%
	Extracts, Essences and Concentrates of Coffee	301,118.05	3,158,776.45	410,640,939.07	60.20%
Total		500,192.43	4,046,464.18	526,040,343.08	100.00%

Source: AFA – Coffee Directorate

1.5.1. Country of Origin

In the quarter under review Kenya's coffee import profile shows heavy reliance on a few major suppliers, with over half (54.38 percent) coming from Brazil (19.96 percent), India (17.87 percent), and Rwanda (16.55 percent). The dominance of Brazil out of 21 countries suggests significant importation of processed coffee products such as instant coffee.

Notable regional suppliers were Tanzania (11.65

percent), Uganda (7.65 percent), Ethiopia (3.84 percent) and Asian suppliers included Malaysia (8.91 percent), UAE (7.19 percent), China, Hong Kong, Vietnam, Thailand. For more details, refer to Table 10.

Table 10: Import Origins April - June (2024/2025)

Origin Country	Volumes (Kgs)	Value (USD)	Value (KES)	% Share
Brazil	99,862.20	1,516,168.19	197,101,864.34	19.96%
India	89,392.30	1,022,444.76	132,917,818.15	17.87%
Rwandese Republic	82,800.00	609,891.70	79,285,921.46	16.55%
Tanzania	58,253.00	191,610.49	24,909,363.18	11.65%
Malaysia	44,554.61	319,505.56	41,535,722.88	8.91%
Republic of Uganda	38,261.30	7,071.70	919,320.75	7.65%
United Arab Emirates	35,978.60	91,726.25	11,924,411.96	7.19%
Ethiopia	19,231.00	37,826.59	4,917,456.88	3.84%
Egypt	6,000.00	87,089.02	11,321,572.57	1.20%
Hong Kong	5,495.38	10,064.46	1,308,380.12	1.10%
China	4,482.00	6,301.95	819,252.99	0.90%
South Africa	4,369.60	28,795.70	3,743,440.74	0.87%
Italy	3,886.64	9,452.11	1,228,774.18	0.78%
Indonesia	3,432.60	18,410.00	2,393,299.71	0.69%
Vietnam	3,000.00	36,776.66	4,780,966.09	0.60%
Colombia	743.54	9,064.46	1,178,379.29	0.15%
United Kingdom	332.42	3,376.33	438,922.71	0.07%
Thailand	109.20	1,707.82	222,017.12	0.02%
United States	5.04	111.57	14,503.74	0.00%
Republic of Malawi	2.00	11.52	1,498.00	0.00%
Denmark	1.00	11.82	1,536.66	0.00%
Total	500,192.43	4,007,418.64	520,964,423.53	100.00%

Source: AFA – Coffee Directorate

Conclusion

Kenya's coffee sector posted strong export value growth in April–June 2024/2025, with volumes up 7 percent and earnings surging 36 percent, driven by sustained high global prices. The United States, Republic of Korea, and Belgium remained top markets, while 97 percent of shipments were unprocessed green coffee, limiting value capture. Imports were dominated by processed coffee, particularly instant varieties, sourced mainly from Brazil, India, and Rwanda. Although auction volumes

fell sharply due to scheduling changes, rising direct sales and diversified export destinations highlight the industry's adaptability. Expanding value addition remains the key opportunity for unlocking greater earnings resilience.

Introduction

Miraa, Pyrethrum and other industrial (Mpoicd) sub-sector, comprising of Miraa, Pyrethrum, Bixa and other industrial crops plays a key role in Kenya's agricultural and industrial value chains. During April–June 2025, Kenya's industrial crops sector recorded mixed performance, influenced by weather patterns, shifting market demand, and regional competition.

While bixa seed production rose sharply on favorable conditions, pyrethrum output declined due to poor planting material and reduced seasonal yields. Miraa exports to Somalia fell amid heightened Ethiopian competition, though imports from Ethiopia increased under stricter tracking measures. Processed extracts such as norbixin and bixin experienced softer export demand, highlighting the sector's reliance on specific markets.

2.1. Quarterly Highlights

- **Pyrethrum** – 288,632 Kg dry flowers worth KES 89.19 million supplied to processors; 16.3 percent drop from 2024 due to poor planting material and seasonal output decline. Average price KES 309/kg (pyrethrin content 1.95 percent). June harvest improved by favorable May weather.
- **Miraa** – Exports to Somalia reached 934,982 Kg worth KES 4.20 billion, down 29.24 percent due to Ethiopian competition. Imports from Ethiopia rose sharply to 20,353 Kg (from 3,950 Kg in 2024) following stricter legal import tracking.
- **Bixa Seeds** – Production surged to 406,567 Kg worth KES 24.39 million (from 173,750 Kg worth KES 10.43 million in 2024) driven by favorable weather.
- **Norbixin** – 10,280 Kg exported to Ireland, Peru, Brazil, down 23.9 percent on reduced Peru demand and no U.S. orders; export value fell to KES 56.54 million (from KES 74.25 million).
- **Bixin** – 6,459 Kg produced; 4,500 Kg exported solely to Brazil (500 Kg in April, 4,000 kg in June), reflecting demand-driven orders.

2.2. Pyrethrum

Kenya's pyrethrum industry is gradually recovering after years of decline caused by competition from synthetic pesticides, sector mismanagement, and reduced farmer engagement. Known worldwide for its natural insecticidal qualities, the crop is benefiting from government-led revival programs, donor support, and private sector investments.

During the quarter under review, 288,632 Kg of dry pyrethrum flowers valued at KES 89.19 million were supplied to processors representing a 16.3 percent drop from 344,945 Kg in the same period of 2024. This decline was attributed to poor-quality planting materials and reduced seasonal production. The average market price was KES 309/Kg for flowers with a pyrethrin content of 1.95 percent. June recorded higher deliveries, supported by favorable May weather. For more details, refer to Table 11.



Table 11: Pyrethrum Flower Deliveries Comparison for April-May 2024-2025

County	April		May		June	
	2024	2025	2024	2025	2024	2025
Kiambu	-	-	183	153	-	109
Nyandarua	13,238	10,562	6,804	8,553	17,943	13,075
Nyeri	2,350	2,485	2,359	1,720	2,429	2,969
Meru	1,902	470	934	1,852	2,543	2,663
Kisii	140	113	339	302	183	267
Baringo	1,087	784	791	428	1,170	2,403
Elgeyo Marak-wet	12,803	6,967	10,997	3,858	11,657	47,689
Kericho	8,404	2,532	5,048	3,035	8,386	12,923
Laikipia	148	389	95	873	223	2,743
Nakuru	51,602	20,064	59,816	20,272	54,709	48,323
Nandi	202	109	89	69	275	301
Narok	386	459	200	2,112	240	5,905
Uasin Gishu	1,050	-	442	305	1,440	2,684
West Pokot	7,374	5,924	6,718	6,911	6,031	5,709
Nyamira	59	43	34	29	61	54
Bomet	13,838	11,489	11,232	4,284	16,991	23,669
Total	114,583	62,390	106,081	54,756	124,281	171,486

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

PYRETHRUM FLOWER DELIVERIES JUNE 2025

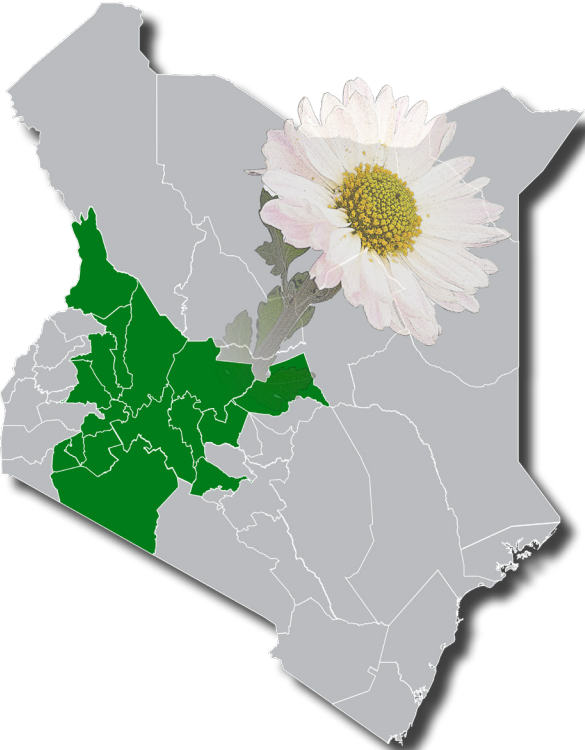
TOTAL DELIVERIES
171,486 KGS

TOP THREE COUNTIES

NAKURU 48,323 KGS

ELGEYO MARAKWET 47,689 KGS

BOMET 23,669 KGS



2.3. Miraa

Miraa remains a key economic crop in Meru, Embu and Tharaka Nithi, supporting thousands of farmers, traders, and transporters. It is consumed locally and exported, mainly to Somalia, despite market restrictions. The Directorate issues all import and export permits.

2.3.1. Miraa Exports

In the quarter under review 934,982 Kg valued at KES 4.20 billion were exported to Somalia. This represents a 29.24 percent decrease compared to the same period in 2024 due to increased competition from Ethiopia.

2.3.2. Miraa Imports

In the quarter under review 20,353 Kg were imported from Ethiopia, a sharp rise from 3,950 Kg in the same quarter last year. The increase was attributed to stricter enforcement and digital tracking of legal imports, replacing unrecorded cross-border trade. The Directorate plans more frequent border surveillance to maintain accurate import data. For more details, refer to Table 12.



Table 12: Miraa Exports Comparison for April-June 2024-2025

Month	2024		2025	
	Volume (Kgs)	Value in billion KES	Volume (Kgs)	Value in billion KES
April	366,351	1.64	284,665	1.28
May	523,332	2.35	356,427	1.6
June	431,797	1.94	293,890	1.32
Total	1,321,480	5.93	934,982	4.20

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

2.4. Bixa

Favorable weather boosted Bixa seed production, increasing from 173,750 Kg worth KES 10.43 million in 2024 to 406,567 Kg valued at KES 24.39 million in 2025. For more details, refer to Table 13.



Table 13: Bixa Seeds Collected in Volume and Value

Month	2024		2025	
	Volume(Kgs)	Value (KES)	Volume(Kgs)	Value (KES)
April	140,000	8,400,000	250,968	15,058,080
May	4,350	261,000	150,757	9,045,420
June	29,400	1,764,000	4,842	290,520
Total	173,750	10,425,000	406,567	24,394,020

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

2.4.1. Norbixin

Norbixin is a natural orange-red pigment derived from annatto seeds (from the Bixa orellana plant). In the quarter under review 10,280 Kg worth KES 56.54 million were exported to Ireland, Peru, and Brazil. This is a 23.9 percent drop from 2024 due to reduced demand from Peru and no orders from the USA during the quarter. For more details, refer to Table 14.

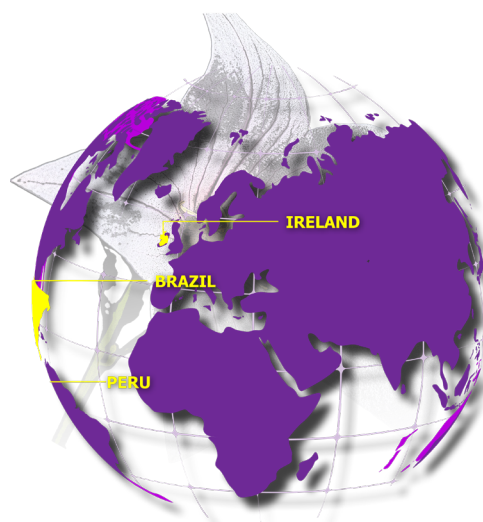
**Table 14. Norbixin Exports in Volume and Value**

Month	2024			2025		
	Quantity(Kgs)	Value (KES)	Destination	Quantity(Kgs)	Value (KES)	Destination
April	6,000	33,000,000	USA	3,850	21,175,000	Brazil
May	6,500	35,750,000	Peru	3,350	18,425,000	Peru
June	1000	5,500,000	Ireland	3,080	16,940,000	Ireland
Total	13,500	74,250,000		10,280	56,540,000	

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

NORBIXIN EXPORTS BY COUNTRY

TOTAL GLOBAL EXPORTS
10,280 KGS



TOP THREE COUNTRIES

BRAZIL 3,850 KGS

PERU 3,350 KGS

IRELAND 3,080 KGS

2.4.2. Bixin

Bixin is the oil-soluble form of the pigment found in annatto seeds (*Bixa orellana*). During the quarter, 6,459 Kg of Bixin were produced. Of this, 4,500 Kg were exported exclusively to Brazil 500 Kg in April and 4,000 Kg in June. Export volumes remained entirely demand-driven, dictated by client orders. For more details, refer to Table 15.



Table 15: Bixin Exports for April-June 2025

Month	Volume Produced	Volume Exported (Kgs)	Destination
April	2,046	500	Brazil
May	2,735	4,000	Brazil
June	1,678	0	-
Total	6,459	4,500	

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

3.0. Nuts and Oil Crops Performance

20

Introduction

Kenya's nuts and oil crops sector is a vital contributor to rural livelihoods, agro-industrial growth, and foreign exchange earnings. Key exports include macadamia nuts, cashew nuts, sesame seeds and coconut products.

Macadamia nuts dominate exports, driven by rising demand in Europe, Asia, and North America, underpinned by shifting consumption trends, supportive policies and increased private investment. The sector has expanded export volumes, diversified markets, and developed new value-added products, enhancing competitiveness, creating jobs, and stimulating industrial growth.

Challenges persist, including overreliance on a limited crop base, high post-harvest losses and low processing capacity. However, ongoing policy reforms and emerging global market opportunities position the sector for inclusive and sustainable growth.

3.1. Quarterly Highlights

- **Export Volume:** 12,787 MT, up 26 percent from 10,137 MT in 2024, driven by strong global demand for macadamia nuts and entry into new markets.
- **Export Value:** KES 4.61 billion, a 53 percent rise from KES 3.01 billion in 2024, supported by improved quality standards and better international prices.
- **Import Volume:** 183,604 MT, marginally higher than 182,440 MT in 2024. Key imports included palm oil, sunflower oil, oilseed cake, soybean oil, and groundnuts.
- **Import Value:** KES 25.69 billion, up from KES 24 billion in 2024, mainly due to a shift from crude oil to higher-priced refined edible oils hence higher unit price resulting to a general increase in the import value.
- **Emerging Products:**
- **Rapeseed Oil:** 9,725 MT worth KES 1.26 billion, primarily exported to Italy.
- **Castor Oil Seeds:** 1,482 MT worth KES 285.2 million in June, primarily imported from India, Uganda, Tanzania and Brazil, after small

volumes reported in the previous quarter.

- **Others:** Small imports such as safflower seeds, linseed, and desiccated coconut added diversity to the import mix.

3.2. Key Export Products

3.2.1. Rapeseed (Crude Oil)

In the quarter under review rapeseed (crude oil) was a major new export in 2025 with 9,725 MT worth KES 1.26 billion, driven by increased processing capacity. Exports targeted European Union and Asian markets for biodiesel and food applications.

3.2.2. Macadamia Nuts – Shelled

Macadamia export volume in the quarter under review grew by 10 percent from 1,923 MT in 2024 to 2,113 MT, while export value surged 82 percent from KES 2.11 billion in 2024 to KES 2.98 billion, reflecting a price increase from KES 854 per Kg in 2024 to KES 1,413 per Kg due to improved kernel quality. The main country of destinations was the USA, Netherlands, Germany and Japan.

3.2.3. Cashew Nuts – Shelled

In the quarter under review cashew nuts export volume and value rose from 108 MT in 2024 to 289 MT in volume and value from KES 76.81 million in 2024 to KES 238.28 million. The increase was attributed to strong European Union and United Arab Emirates market demand and improved processing capacity.



3.2.4. Sesame Seeds

Sesame seeds exports in the quarter under review recorded the fastest growth, with volume and value surged from 40 MT in 2024 to 548 MT and from KES 7.91 million in 2024 to KES 68.97 million. This was driven by expanded production in Lamu (leading to greater seed availability for export) and growing demand from the Middle East for oil extraction.

3.2.5. Coconut Products

In the quarter under review coconut products exports like Crude copra oil at 82.8 MT in volume valued at KES 46.89 million and desiccated coconut at 25 MT in volume valued at KES 11.31 million increased due to improved value addition.

3.2.6. Declining Products

Macadamia nuts in shell and castor oil exports dropped sharply or disappeared due to changing export strategies and supply constraints.

Overall, Kenya's exports are diversifying and expanding into high-value markets across the USA, Europe, and Asia, reinforcing the sector's strategic importance for trade and industrial growth. For more details, refer to Table 16.

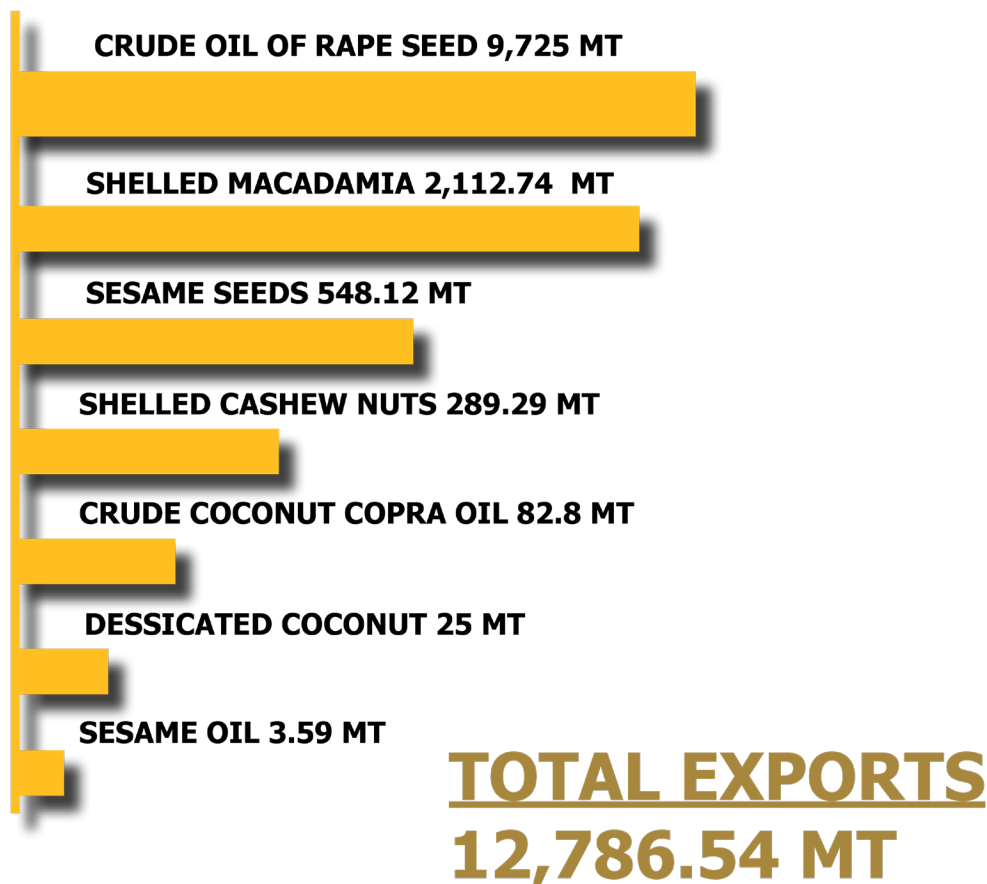


Table 16: Nuts and Oil Crops Export Performance: April–June (2024 vs. 2025)

Product	Volume (MT)	Value in million (KES)	Volume (MT)	Value in million (KES)
	2024	2024	2025	2025
Macadamia Nuts in Shell	6,242.05	1,036.00	-	-
Macadamia Nuts Shelled	1,922.59	1,642.24	2,112.74	2,984.55
Castor Oil	1,800.00	228.56	-	-
Sesame Seeds	40	7.91	548.12	68.97
Cashew Nuts, Shelled	108.41	76.81	289.29	238.28
Coconut (Copra) Oil, Crude	0	0	82.8	46.89
Desiccated Coconut	2.6	2.11	25	11.31
Sesame Oil	21	14.86	3.59	3.91
Crude Oil of Rape Seed	-	-	9,725.00	1,257.05
Total	10,137.65	2,821.50	12,786.54	4,610.95

Source: AFA-Nuts and Oil Crops Directorate

NUTS & OILS CROPS EXPORT PERFORMANCE



Key Import Products

In the quarter under review total volumes rose slightly from 182,209 MT in 2024 to 183,139 MT, while total value grew from KES 23.97 billion in 2024 to KES 25.61 billion, driven by higher global prices and a shift to refined products. For more details, refer to Table 17.

3.3.1. Palm Oil

Palm Oil still the dominant edible oil, mainly from Malaysia and Indonesia, with emerging suppliers Cameroon and South Africa. Palm Oil import volume in the quarter under review fell slightly from 172,174 MT in 2024 to 168,418 MT but value rose from KES 22.22 billion in 2024 to KES 23.58 billion this was due to elevated prices.

3.3.2. Soya Bean Oil

In the quarter under review soya bean oil imports had a steep decline of 32 percent at 1,671.02 MT in volume and 67 percent drop at KES 252.48 million in value as compared the same period in 2024. This was ascribed to an increased local production and substitution by other oils. The main suppliers included USA, Germany and Uganda, with new entrants Benin and Togo.

3.3.3. Sunflower Oil

In the quarter under review sunflower imports more than doubled in volume from 1,773 MT in 2024 to 3,909 MT and value rose to KES 601.45 million, reflecting high demand. However, these imports are expected to decline in the coming years due to ongoing government efforts aimed at boosting domestic sunflower seed cultivation and enhancing local edible oil processing capacity

3.3.4. Oil Cake

In the quarter under review oil cake imports volume rose from 2,942 MT in 2024 to 3,968 MT and the value increased from KES 29.87 million in 2024 to KES 46.24 million. This was attributed to the expanding livestock and poultry sectors. The oilseed cake is mainly imported mostly from Tanzania and Uganda.

3.3.5. Groundnuts

Groundnuts import in the quarter under review nearly doubled in volume from 1,212 MT to 2,410 MT and the value rose from KES 245 million in 2024 to KES 629 million, driven by demand for edible nuts and oil extraction. Key country of origin India, Malawi, Argentina, Uganda and Tanzania.

3.3.6. Castor Oil Seeds

Castor oil seeds imports in the quarter under review volume more than doubled from 610 MT in 2024 to 1,482 MT but the value dropped from KES 274.6 million in 2024 to 285.2 million due to lower unit prices. This increase was due to local processing capacity growing demand for industrial oil applications. The product is mainly imported from India, Uganda, Tanzania and Brazil.

3.3.7. Sesame Seeds & Oil

In the period under review sesame seed imports rose modestly from 95.3 MT in 2024 to 118.8 MT while sesame oil imports slightly declined from 1.33 MT in 2024 to 1.25 MT. Imports are shifting toward raw oilseeds for domestic oil extraction and potential re-export, with Ethiopia and Sudan emerging as likely sources.

3.3.8. Coconut Products

Coconut-based product imports saw mixed trends. In the quarter under review crude copra oil imports ceased while refined coconut oil import volumes doubled from 23.29 MT in 2024 to 47.22 MT. Desiccated coconut appeared for the first time at 17 MT in volume. These changes are as a result of evolving consumer preferences and processing shifts, influenced by pricing and supply from Southeast Asian producers such as the Philippines and Indonesia from Philippines and Indonesia.

3.3.9. Trade Dynamics

Kenya's edible oil and nut imports are being reshaped by supplier diversification into Africa and Asia, policy shifts and evolving consumer preferences driving a move toward higher-value, locally processed products.

Lastly, coconut-based product imports saw mixed trends. Imports of crude copra oil ceased entirely, while refined coconut oil imports doubled in volume. Desiccated coconut also entered the import list in 2025 with 17 MT. These changes are a result of evolving consumer preferences and processing shifts, influenced by pricing and supply from Southeast Asian producers such as the Philippines and Indonesia.



Table 17: Nuts and Oil Product and Produce Imports in April–June 2024 and 2025

Product	2024		2025	
	Volume (MT)	Value (KES Million)	Volume (MT)	Value (KES Million)
Palm oil	172,173.75	22,217.66	168,418.37	23,579.34
Soya Bean Oil	2,471.43	762.78	1,671.02	252.48
Oil Cake	2,941.57	29.87	3,967.50	46.24
Sunflower Oil	1,773.20	248.44	3,908.60	601.45
Groundnuts	1,211.65	245.04	2,410.29	628.56
Castor Oil Seeds	610.12	274.61	1,482.02	285.2
Castor Oil	650.78	89.18	21.76	7.41
Cashew Nuts, Shelled	107.32	48.24	0	0
Sesame Seeds	95.32	18.33	118.82	25.46
Sesame Oil	1.33	1.37	1.25	1.04
Coconut (Copra) Oil, Crude	126	19.99	0	0
Coconut Oil (Refined Crude)	23.29	5.01	47.22	15.4
Macadamia Nuts in Shell	0	0	198	35.39
Desiccated Coconut	0	0	17	3.12
Groundnut Oil (Crude)	16	4.92	16.32	3.34
Sunflower Seeds	0.92	1.51	20.73	3.79
Safflower Seeds	0	0.09	17	2.36
Linseed	4.03	1.24	4.25	0.7
Linseed Oil, Crude	0.5	0.28	1.81	1.02
Copra	1.5	0.26	0	0
Bambara Beans	0	0.02	817.01	122.44
Total	182,208.71	23,968.84	183,138.97	25,614.74

Source: AFA-Nuts and Oil Crops Directorate

Conclusion

In the quarter of April and June 2025, Kenya's nuts and oil crops sector recorded robust growth, with exports reaching 12,786.54 MT and generating KES 4.61 billion an improvement over the same period in 2024. This performance was driven primarily by strong demand for macadamia nuts and crude rapeseed oil in international markets. The sustained upward trend underscores the sector's potential to further boost agricultural export earnings, contingent on continued progress in market access, value addition and production capacity.

Conversely, Kenya remains a net importer of edible oils, with imports meeting over 90 percent of domestic consumption. Key imports—palm, sunflower, coconut, rapeseed, and soybean oils—are sourced predominantly from Indonesia, Malaysia, Egypt, and Canada.

4.0. Fibre Crops Sector

25

Introduction

The Fibre Crops sub-sector, comprising cotton, sisal and other natural fibres, plays a key role in Kenya's agricultural and industrial value chains. Between April and June 2025, the sector experienced mixed performance, with cotton recording improved yields driven by better inputs and agronomic support, while sisal faced output and price declines due to adverse weather conditions. The Directorate continued to implement measures aimed at enhancing production, market access, and value addition, while facilitating trade with regional and international markets.

4.1. Quarterly Highlights

- Cotton: Yields rose 20 percent to 153 Kg/acre, supported by certified seed, timely inputs and stronger extension services which is still below the 228 Kg/acre national average.
- Import: 1,869.66 MT of cotton by-products were imported from Uganda and Tanzania worth KES 62.32 million to supplement processing.
- Sisal: Exports dropped by 9 percent to 5,415.50 MT; earnings declined to KES 1.12 billion due to drought and lower prices.
- Export: Grade UG dominated exports (58 percent of volume, KES 688.8 million). Kenya supplied 23 markets, led by Nigeria, Morocco, and Saudi Arabia.

4.2. Cotton

4.2.1. Seed cotton Production

During the review period, the average cotton yield rose to 153 Kg per acre, representing a 20 percent increase from the previous period's yield of 127 Kg per acre. However, this gain in productivity still fell short of the national average of 228 Kg per acre (572 Kg/Ha).

The improvement in productivity and the resulting rise in production volume can largely be credited to increased access to certified seeds distributed by various agencies, which exhibited notably higher germination rates than local seed varieties. Other key contributing factors included:

- Timely seed distribution by ginneries, ensuring farmers received inputs ahead of the rainy season.
- Strengthened coordination between AFA-Fibre Crops Directorate and County officials in providing extension services to farmers, particularly in Lamu, Homa Bay, Siaya, Busia and Meru counties.

4.2.2. Cotton By-Products Importation

To augment local production, Kenya imported cotton by-products during the reporting period. Cotton seedcake was brought in from Uganda, while cotton seed meal was sourced from Tanzania. The total import volume amounted to 1,869.66 MT, valued at KES 62,315,949. This supplementary supply underscores the growing domestic demand for cotton processing inputs and highlights the interdependence within the regional cotton value chain. For more details, refer to Table 18.

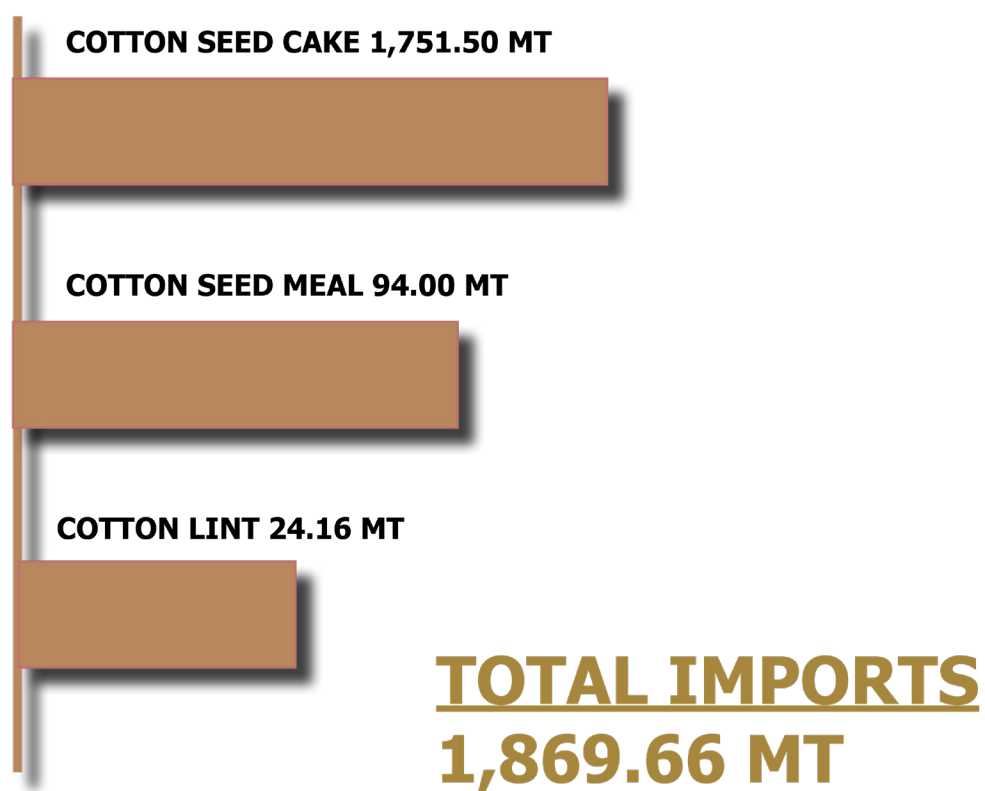


Table 18: Cotton Products Imports April – June 2025

Product	Origin	Volume (MT)	Value (KES)
Cotton Seed Cake	Tanzania	1,751.50	53,437,792
Cotton Seed Meal	Tanzania	94.00	3,249,809
Cotton Lint	Uganda	24.16	5628348
Total	1,869.66	62,315,949	

Source: AFA-Fibre Crops Directorate

COTTON PRODUCTS IMPORTS APRIL - JUNE 2025



4.3. Sisal

4.3.1. Area under Sisal

Sisal cultivation in Kenya is mainly carried out by eight large estates spread across six counties, with Taita Taveta County accounting for the largest share in both acreage and production volume. Alongside these estates, smallholder farmers also grow sisal, primarily along boundaries and hedgerows, in various counties including Taita Taveta, Kilifi, Makueni, Kitui, Machakos, Migori, Homa Bay, Kisumu, Siaya, Baringo and West Pokot. This dual production system highlights the crop's adaptability and its significance in both commercial agriculture and subsistence farming. For more details, refer to Table 19.



Table 19: Area under Sisal Production by County

County	Name of Estate	Area (Ha)
Kilifi	Kilifi Plantation,	5,566.75
	Rea Vipingo	
Kwale	Agro Fibre Ltd	4,595.39
Taita Taveta	VoiPoint Ltd	9,825.79
	Teita Estates	
Makueni	DWA Estate	5,369
Nakuru	Majani Mingi Estates	333.18
Baringo	Migotyo Ltd	6,233.90
Total Area Under Estates		31,924.01
Area Under Smallholder Farmers*		1,200.00
Total		33,124.01

Source: AFA-Fibre Crops Directorate



4.3.2. Sisal Trade

In April 2025, sisal exports stood at 1,979.50 MT, down from 2,116.20 MT in April 2024. However, exports in May rose to 1,813.40 MT, up from 1,728 MT in the same month the previous year. In June, there was a slight decline to 1,622.60 MT, compared to 2,097.40 MT in June 2024. Overall, total exports for the second quarter of 2025 reached 5,415.50 MT, representing a 9 percent decrease from 5,941.60 MT recorded during the same period in 2024. This decline was largely attributed to drought conditions that limited the harvesting of green leaf from sisal estate plantations. Additionally, production levels during the quarter were generally lower than in the corresponding period of 2024. Nonetheless, sisal prices remained relatively stable throughout the three-month period. The average Free on Board (FoB) price per kilogram experienced a notable decline, falling from KES 212.20 in April 2024 to KES 208.10

in April 2025. This downward trend persisted in May, with prices decreasing from KES 216.74 in 2024 to KES 214.79 in 2025, and further in June, from KES 211.86 to KES 207.54 over the same period. The reduced prices in 2025 point to weakening market conditions or increased competition in key export markets.

Reflecting the shifts in both export volumes and prices, the total export value declined from KES 447.75 million in April 2024 to KES 408.30 million in April 2025. In May, there was a modest increase from KES 370.94 million in 2024 to KES 380.42 million in 2025. However, June recorded a significant drop, with export earnings falling from KES 440.37 million in 2024 to KES 333.14 million in 2025. Overall, the total export value for the second quarter declined from KES 1.259 billion in 2024 to KES 1.121 billion in 2025. For more details, refer to Table 20.

Table 20: Volume of Sisal Exports April-June 2025

Year	2024	2025						
Month	April	May	June	Total	April	May	June	Total
Volume (MT)	2,116.20	1,728.00	2,097.40	5,941.60	1,979.50	1,813.40	1,622.60	5,415.50
Average FoB price (KES per Kg)	212.20	216.74	211.86	-	208.10	214.79	207.54	-
Value (KES million)	447.75	370.94	440.37	1,259.06	408.30	380.42	333.14	1,121.86

Source: AFA-Fibre Crops Directorate

4.3.3. Volumes, Prices and value by Grades

4.3.3. Volumes, Prices and value by Grades
During the review period, a total of 3,146.50 MT of grade UG sisal was exported to various markets, making it the most sought-after grade globally and accounting for 58.1 percent of total exports. The second most exported grade was SSUG, with 1,771.80 MT, representing 32.7 percent of the total volume. Of the nine possible sisal grades, five were actively traded during the period. Grade 3L commanded the highest price

at KES 239 per kilogram, while Grade Tow.1 recorded the lowest price at KES 100.52 per Kg. In the second quarter of 2025, Kenya exported a total of 5,415.50 MT of sisal, with April recording the highest volume at 1,979.50 MT. Grade UG dominated both in export volume (3,146.50 MT) and value (KES 688.80 million), followed by SSUG and TOW.1. Price trends varied across the grades: UG prices showed an upward trajectory, SSUG prices declined, Grade

3L remained relatively stable, while TOW.1 prices fluctuated. The quarter generated a total export value of KES 1,239.27 million, with January being the most lucrative month. These trends reflect evolving market dynamics in terms of demand, pricing, and grade performance in the sisal export sector. For more details, refer to Table 21.



Table 21: Volume, Average F.O.B Price by Grade and Value April-June 2025

Grade	Volume (MT)				F.O.B price per Kg (KES)			Value (KES) million			
	April	May	June	Total	April	May	June	April	May	June	Total
UG	994	1,093.00	1,059.50	3,146.50	218.77	222.43	217.41	216.92	242.68	229.2	688.8
SSUG	795.5	532	444.3	1,771.80	215.93	207.13	208.09	171.65	110.09	91.77	373.51
TOW.1	176	140.4	115.8	432.2	91.76	116.2	93.6	16.15	16.31	11.45	43.91
3L	9.25	48	3	60.25	255.46	236.34	225.2	2.36	11.34	0.72	14.42
NO. 1	4.75	0	0	4.75	255.46	0	0	1.21	0	0	1.21
Total	1,979.50	1,813.40	1,622.60	5,415.50	0	0	0	408.3	380.4	333.1	1,121.85

Source: AFA-Fibre Crops Directorate

4.3.4. Sisal Exports by Destinations

During the review period, Kenya exported sisal fibre to 23 destinations worldwide. A comparison of fourth-quarter export data from 2024 and 2025 reveals a drop in both volume and value. Export volumes decreased marginally in the quarter under review from 5,942 MT in 2024 to 5,415 MT in 2025, while export earnings fell more sharply from KES 1.25 billion in 2024 to KES 1.12 billion in 2025. Nigeria remained the top export destination in both years, though its export volume dropped from 3,370 MT in 2024 to 1,258 MT in 2025. Morocco and Saudi Arabia were the second and third largest markets, respectively, with only minor fluctuations. These shifts highlight evolving market dynamics and changing demand patterns in the global sisal fibre trade. Refer to Table 22 and 23 for more details.



Table 22: Sisal Fibre Exports April-June

Year	Volume (MT)	Value (KES) million
2024	5,942.00	1,259.06
2025	5,415.30	1,121.92

Source: AFA-Fibre Crops Directorate

Table 23: Sisal Fibre Exports by Destinations

Destination	Volume (MT)				Value (KES) million			
	April	May	June	Total	April	May	June	Total
Nigeria	586	392	280	1,258.00	125.34	82.39	58.77	266.5
Morocco	280	252	196	728	61.49	55.5	42.97	159.95
Saudi Arabia	136	336	241	713	30.45	76.85	55.07	162.42
China	80	248.4	154.8	483	16.42	38.11	27.23	81.76
Senegal	112	196	140	448	24.16	41.28	26.24	91.69
Ghana	140.5	112	119.5	372	30.91	24	21.98	76.88
Spain	126	-	224	350	27.72	-	43.61	71.33
Benin	109	-	168	277	23.84	-	35.83	59.7
Philippines	176	-	-	176	16.15	-	-	16.15
Guinea	82	-	-	82	18.4	-	-	18.4
India	-	52	28	80	-	12.15	5.98	18.13
Turkey	26	-	52	78	6.05	0	11.18	17.22
Togo	28	28	-	56	6.18	6.16	-	12.34
Ivory Coast	-	56	-	56	-	12.24	-	12.24
Belgium	-	48	-	48	-	11.34	-	11.34
Egypt	-	28	8.3	36.3	-	6.1	1.93	8.02
Burkina Faso	28	-	-	28	6.16	-	-	6.16
Syria	28	-	-	28	5.8	-	-	5.8
Mali	28	-	-	28	5.63	-	-	5.63
Jordan	-	28	-	28	-	6.15	-	6.15
Japan	-	25	-	25	-	5.53	-	5.53
UAE	-	12	11	23	-	2.64	2.35	5
Sri Lanka	14	-	-	14	3.58	0	-	3.58
Total	1,979.50	1,813.40	1,622.60	5,415.30	408.28	380.44	333.14	1,121.92

Source: AFA-Fibre Crops Directorate

Introduction

Food Crops Directorate reported in April–June 2025, trade was defined by strong import reliance for cereals to bridge seasonal and structural supply gaps, alongside targeted imports of pulses and tubers.

Exports showed mixed results green grams and maize recorded sharp growth, while wheat, rice, beans and Irish potatoes declined due to domestic demand pressures and lower surpluses. The quarter reflected Kenya's twin strategy of stabilizing supply through imports while strengthening local production to cut external dependence.

5.1. Quarterly Highlights

- Wheat and Rice remained the leading imports at 621,088.47 MT and 187,843.52 MT, respectively, underscoring substantial local production deficits. Wheat imports fell by 15 percent compared to 2024 following the implementation of the Local Wheat Purchase Programme aimed at reducing import dependence and supporting domestic producers.
- Maize imports more than doubled to 160,218.74 MT from 2024 levels, driven by low domestic stocks ahead of the harvest season. Tanzania accounted for the majority of supplies.
- Pulses exhibited mixed trends: beans imports rose by 57 percent to 10,228.73 MT; green grams surged to 925.53 MT; while Irish potato imports fell by 67 percent to 429.86 MT, indicating strong local production.
- Exports were led by green grams, which increased by 101 percent to 6,875.56 MT, with Vietnam and the UAE as key destinations. Maize exports rose to 152.54 MT, while wheat, rice, beans and Irish potatoes posted notable declines.
- Regional trade remained central, with Tanzania as the main supplier of maize, beans, potatoes, and green grams, while Australia and Pakistan led global supplies of wheat and rice, respectively.

5.2. Key Import Food Crops

5.2.1. Maize

During the quarter under review, Kenya's maize imports surged 102 percent, rising from 79,385.98 MT in 2024 to 160,218.74 MT valued at KES 5.65 billion, driven by reduced local stocks. May recorded the highest import volume at 72,526.22 MT, while June posted the highest import value at KES 3.42 billion. Maize was sourced from 10 countries, with Tanzania dominating at 154,573.04 MT (96.48 percent of total imports) valued at KES 5.54 billion. Refer to Table 24, 30 and 31 for more details.



Table 24: Maize Import Sources April – June 2025

No	Source	Volume (MT)	Value (KES)	% IMPORT VOLUME
1.	Tanzania	154,573.04	5,535,508,547.00	96.48
2.	Ethiopia	4,355.20	48,030,840.94	2.72
3.	Uganda	796.58	35,472,905.40	0.50
4.	Argentina	286.06	17,479,484.74	0.18
5.	S/Africa	202.00	14,722,580.38	0.12
6.	UAE	2.40	280,709.74	0.00
7.	USA	2.30	219,996.63	0.00
8.	UK	0.08	55,911.30	0.00
9.	Peru	0.05	102,364.82	0.00
10.	Unspecified	1.03	574,575.00	0.00
Total		160,218.74	5,652,447,915.95	100.00

Source: AFA - Food Crops Directorate.

5.2.2. Wheat

Kenya imported 621,088.47 MT of wheat worth KES 22.63 billion in April-June 2025, with June recording the highest monthly intake at 272,480.27 MT. This marked a 15 percent decline from 732,160.62 MT in 2024, reflecting the impact of the Wheat Purchase Programme aimed at boosting local production and reducing import reliance. Wheat was sourced from nine

countries, led by Australia with 346,688.55 MT (55.82 percent market share) valued at KES 12.72 billion. Despite the decline, high import volumes underscore the persistent shortfall between domestic supply and industrial milling demand. Refer to Tables 25, 30 and 31 for more details.

Table 25: Wheat Import Sources April – June 2025

S/No	Source	Volume (MT)	Value (KES)	% Import Volume
1.	Australia	346,688.55	12,722,477,938.00	55.82
2.	Argentina	208,198.00	7,195,571,121.00	33.52
3.	Russia	26,460.00	952,220,385.30	4.26
4.	Canada	24,020.00	948,013,444.90	3.87
5.	USA	10,800.00	389,414,066.40	1.74
6.	Ukraine	4,885.00	425,812,805.60	0.79
7.	Ethiopia	36.55	557,150.61	0.01
8.	Turkey	0.37	34,986.22	0.00
9.	S/Africa	0.00	566.97	0.00
Total		621,088.47	22,634,102,465.00	100.00

Source: AFA - Food Crops Directorate.

5.2.3. Rice

In the quarter under review Kenya imported 187,843.52 MT of rice worth KES 13.19 billion in 2025, a 43 percent increase from 131,249.59 MT in 2024. Strong urban demand and limited domestic production drove reliance on foreign supply, with notable surges in May and June helping bridge supply gaps and stabilize prices. Rice was sourced from 14 countries, led by Pakistan with 93,279.81 MT (49.66 percent market share, KES 6.03 billion), followed closely by India with a 48.26 percent market share. Refer to Tables 26, 30 and 31.



Table 26: Rice Import Sources April-June 2025

S/No.	Source	Volume (MT)	Value (KES)	% Import Volume
1.	Pakistan	93,279.81	6,034,407,247.00	49.66
2.	India	90,651.50	6,357,323,288.00	48.26
3.	Tanzania	2,559.15	690,906,106.00	1.36
4.	Thailand	1,063.58	71,285,337.77	0.57
5.	UAE	257.88	17,862,642.23	0.14
6.	USA	8.28	13,260,600.00	0.00
7.	Ethiopia	7.05	288,500.00	0.00
8.	Unspecified	6.42	591,450.00	0.00
9.	China	3.75	265,877.10	0.00
10.	Uganda	3.50	452,880.00	0.00
11.	Italy	2.16	445,717.26	0.00
12.	Japan	0.01	39,089.13	0.00
13.	Turkey	0.40	59,826.25	0.00
14.	UK	0.03	28,393.26	0.00
Total		187,843.52	13,187,216,954.00	100.00

Source: AFA - Food Crops Directorate

5.2.4. Beans

Beans imports rose 57 percent in the quarter under review, from 6,503.09 MT in 2024 to 10,228.73 MT, valued at KES 262.44 million. The increase was driven by erratic rainfall affecting local production, with steady imports from April to June supported by regional trade with Uganda, Ethiopia and Tanzania. During the period, beans were sourced from seven countries, led by Tanzania with 9,201.30 MT (89.96 percent market share) valued at KES 174.52 million. For more details, refer to Tables 27, 30 and 31.



Table 27: Beans Import Sources April – June 2025

S/No	Sources	Volume (MT)	Value (KES)	% Import Volume
1.	Tanzania	9,201.30	174,521,627.70	89.96
2.	Ethiopia	962.2	13,647,685.66	9.41
3.	France	25.51	27,477,175.73	0.25
4.	United States	20.18	22,688,412.37	0.19
5.	Chile	10.45	12,013,993.27	0.10
6.	China	9.0	12,088,171.81	0.09
7.	Netherlands	0.09	1,176.57	0.00
Total		10,228.73	262,438,243.20	100.00

Source: AFA - Food Crops Directorate.

5.2.5. Irish Potato

Irish potato imports fell by 67 percent in the quarter under review, from 1,288.16 MT in 2024 to 429.86 MT, valued at KES 46.66 million. The decline, particularly in June, reflects improved domestic production and a focus on importing specialty varieties for processing or seed purposes. During this period, potatoes were sourced from 13 countries, led by Tanzania (55.89 percent) and Egypt (41.43 percent), totaling 240.24 MT valued at KES 7.54 million. Refer to Tables 28, 30 and 31 for more details.

Table 28: Irish Potatoes Import Sources April-June 2025

S/No	Sources	Volume (MT)	Value (KES)	% Import Volume
1.	Tanzania	240.24	7,543,450.25	55.89
2.	Egypt	178.1	34,163,167.31	41.43
3.	South Africa	4.13	1,904,383.16	0.96
4.	India	2.97	741,066.31	0.69
5.	UAE	2.89	1,506,101.12	0.67
6.	Netherlands	0.55	201,728.59	0.13
7.	Belgium	0.4	211,312.07	0.09
8.	Germany	0.28	155,727.73	0.06
9.	France	0.13	61,942.52	0.03
10.	United States	0.12	155,625.77	0.03
11.	Spain	0.029	10,709.43	0.01
12.	Singapore	0.014	8,028.13	0.01
13.	Japan	0.00025	207.64	0.00
Total		429.86	46,663,450.03	100.00

Source: AFA - Food Crops Directorate

5.2.6. Green gram

Green gram imports surged from 59.59 MT in 2024 to 925.53 MT in 2025, valued at KES 21.00 million, driven by poor domestic harvests and increased demand. Imports showed fluctuating monthly trends, including a price drop in June that lowered CIF values. During the period, green grams were sourced from five countries, led by Tanzania with 923.23 MT (99.75 percent of total volume), valued at KES 20.88 million. For more details, refer to Tables 29, 30 and 31.



Table 29: Green gram Import Sources April-June 2025

S/No	SOURCES	TONS (MT)	Value (KES)	% Import Volume
1.	Tanzania	923.23	20,878,537.54	99.75
2.	Ethiopia	2.0	34,500.00	0.22
3.	Madagascar	0.2	57,025.62	0.02
4.	Brazil	0.1	27,720.12	0.01
5.	Netherlands	0.001	1,751.44	0.00
Total		925.53	20,999,534.72	100.00

Source: AFA - Food Crops Directorate.

Table 30: Import Volume and Value For April to June, 2025.

S/ No.	Crop	April	May	June	Total				
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
1.	Maize	41,168.74	1,101.01	72,526.22	1,134.67	46,523.78	3,416.76	160,218.74	5,652.45
2.	Wheat	146,555.38	5,448.26	202,052.82	7,307.04	272,480.27	9,878.80	621,088.47	22,634.10
3.	Rice	63,630.05	4,934.27	47,215.30	3,163.28	76,998.17	5,089.67	187,843.52	13,187.22
4.	Beans	3,141.27	76.67	3,260.02	92.37	3,827.44	93.40	10,228.73	262.44
5.	Irish Potato	254.50	18.75	97.25	13.07	78.11	14.84	429.86	46.66
6.	Green Gram	794.43	17.11	86.10	12.52	171.70	2.72	925.53	21.00

Source: AFA - Food Crops Directorate

IMPORT VOLUME AND VALUE FOR APRIL TO JUNE 2025

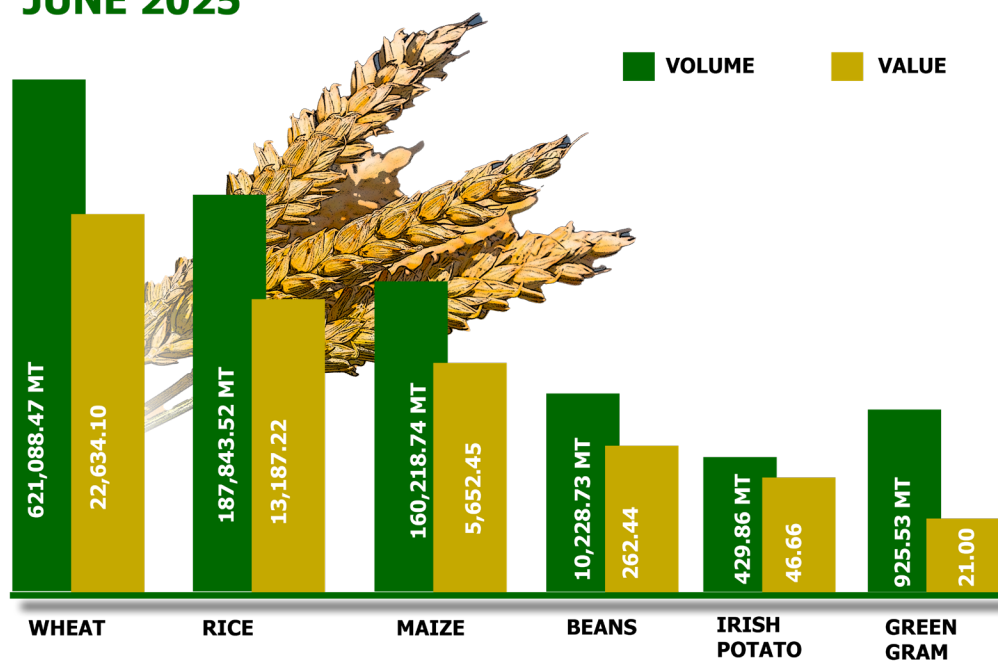


Table 31: Comparison Of Import Volumes For April To June, 2024 Versus 2025.

Crops	April		May		June		Total Volume 2024	Total Volume 2025
	2024	2025	2024	2025	2024	2025		
Maize	25,045.52	41,168.74	26,234.83	72,526.22	28,105.63	46,523.78	79,385.98	160,218.74
Wheat	199,388.94	146,555.38	255,873.79	202,052.82	276,897.89	272,480.27	732,160.62	621,088.47
Rice	82,651.26	63,630.05	10,327.96	47,215.30	38,270.37	76,998.17	131,249.59	187,843.52
Beans	2,103.81	3,141.27	1,968.30	3,260.02	2,430.98	3,827.44	6,503.09	10,228.73
Irish Potatoes	933.91	254.50	202.00	97.25	152.25	78.11	1,288.16	429.86
Green Grams	0.15	794.43	34.16	86.10	25.28	171.70	59.59	925.53

Source: AFA - Food Crops Directorate.

5.3. Key Export Food Crops

5.3.1. Maize

Maize exports in the quarter of April – June 2025 rose from 24.26 MT in 2024 to 152.54 MT, valued at KES 14.10 million, driven by improved market conditions and opportunities. Exports went to six destinations, led by the UK with 111 MT (72.77 percent, KES 11.35 million) and Qatar with 37.04 MT (24.28 percent, KES 1.87 million). For more details, refer to Table 32, 38 and 39.

**Table 32: Maize Export Destination April-June 2025**

S/No	Destination	Volume (MT)	Value (KES)	% Export Volume
1.	UK	111.00	11,347,777.11	72.77
2.	Qatar	37.04	1,865,000.00	24.28
3.	UAE	3.17	66,000.00	2.08
4.	Netherlands	0.90	546,577.36	0.59
5.	South Sudan	0.24	79,199.28	0.16
6.	Belgium	0.19	191,867.80	0.12
Total		152.54	14,096,421.55	100.00

Source: AFA - Food Crops Directorate.

5.3.2. Wheat

In the quarter under review wheat exports fell sharply by 91.6 percent, from 25 MT in 2024 to 2.09 MT, valued at KES 0.15 million, due to high import dependency and attractive domestic prices. During the quarter, Qatar accounted for 91.87 percent of total exports, with a value of KES 2.49 million. For more details, refer to Tables 33, 38 and 39.

Table 33: Wheat Export Destination April-June 2025

S/No	DESTINATION	TONS (MT)	TOTAL CIF VALUE (KES)	% EXPORT VOLUME
1.	Qatar	1.92	148,000	91.87
2.	France	0.17	2,494.44	8.13
Total		2.09	2,494.44	100.00

Source: AFA - Food Crops Directorate.

5.3.3. Rice

In the quarter under review rice exports fell by 66 percent, from 90.76 MT in 2024 to 30.83 MT, valued at KES 5.31 million, driven by reduced local surpluses and strong domestic demand following the removal of duty-free imports. Exports targeted niche demand for traditional varieties, such as those from Mwea, and went to 10 countries, led by the DRC (58.45 percent), with 18.02 MT valued at KES 1.43 million followed by USA (14.79 percent), with 4.56 MT valued at KES 1.28 million. Refer to Tables 34 and 39 for more details.



Table 34: Rice Export Destination April-June 2025

S/No	Destination	Volume (MT)	Value (KES)	% Export Volume
1.	DRC	18.02	1,434,734.67	58.45
2.	USA	4.56	1,277,293.78	14.79
3.	Unspecified	3.52	1,113,878.00	11.42
4.	South Sudan	2.9	1,143,550.00	9.41
5.	Marshall	1.09	180,900.00	3.54
6.	Hong Kong	0.33	82,500.00	1.07
7.	Singapore	0.15	28,000.00	0.49
8.	India	0.12	15,600.00	0.39
9.	Panama	0.09	25,500.00	0.29
10.	Liberia	0.05	5,500.00	0.16
Total		30.83	5,307,456.45	100.00

Source: AFA - Food Crops Directorate.

5.3.4. Beans

In the quarter under review pulses performed strongly in regional trade, led by beans exports volume at 2,051.78 MT valued at KES 242.90 million, underscoring their importance in East and Central Africa. However, beans exports fell by 54 percent in volume, from 4,477.89 MT, in 2024 due to production challenges such as erratic rainfall and pest or disease outbreaks that reduced yields and exportable surplus.

During the quarter under review, beans were exported to 10 destinations, led by Pakistan with 984.00 MT (47.96 percent) valued at KES 125.55 million and India with 28.27 percent of the volume. Refer to Tables 35, 38 and 39.

Table 35: Beans Export Destination April-June 2025

S/No	Destination	Volume (MT)	Value (KES)	% Export Volume
1.	Pakistan	984.00	125,550,331.60	47.96
2.	India	580.00	58,544,468.56	28.27
3.	South Sudan	285.96	31,845,720.41	13.94
4.	Ethiopia	190.00	245,572,702.52	9.26
5.	Qatar	6.00	101,050,000.00	0.29
6.	US	4.94	1,023,950.00	0.24
7.	Saudi Arabia	0.80	289,296.00	0.04
8.	Unspecified	0.08	36,252.00	0.00
Total		2,051.78	242,897,289.00	100.00

Source: AFA - Food Crops Directorate.

5.3.5. Irish Potato

Irish potato exports in the quarter under review fell by 24 percent to 129.99 MT, valued at KES 14.37 million, due to limited exportable stocks and focus on domestic consumption. Key country of destination was Mayotte with 67.85 MT (52.20 percent) valued at KES 6.84 million and Somalia with 50.00 MT (38.47 percent). Refer to Tables 36, 38 and 39.

5.3.6. Green Grams

Green gram exports in the quarter under review surged by 101 percent, from 3,415.54 MT in 2024 to 6,875.56 MT, valued at KES 625.75 million, driven by the main harvest season in Kitui, Makueni, and Machakos and strong demand from India, UAE, and other international markets. Exports were shipped to 10 destinations, led by Vietnam with 2,928.00 MT (42.59 percent) valued at KES 244.71 million, followed by the UAE (24.43 percent) and Thailand (23.15 percent). Refer to Table 37, 38 and 39 for more details.

Table 36: Irish Potatoes Export Destination April-June 2025

S/No	Destination	Volume (MT)	Value (KES)	% Export Volume
1.	Mayotte	67.85	6,842,212.28	52.20
2.	Somalia	50.00	64,731.50	38.47
3.	South Sudan	6.19	537,074.50	4.76
4.	DRC	5.60	6,600,510.30	4.31
5.	Australia	0.30	318,641.44	0.23
6.	Mauritius	0.02	7,888.00	0.02
7.	United Kingdom	0.02	3,363.04	0.02
Total	129.98	14,374,421.06	100.00	

Source: AFA - Food Crops Directorate.

Table 37: Green Gram Export Destination April-June 2025

S/No	Destination	Volume (MT)	Value (KES)	% Export Volume
1.	Vietnam	2,928.00	244,707,870.60	42.59
2.	UAE	1,680.00	173,852,700.60	24.43
3.	Thailand	1,591.50	141,673,430.00	23.15
4.	China	300.00	29,086,625.64	4.36
5.	South Sudan	110.60	4,297,297.48	1.61
6.	Singapore	104.00	10,968,256.48	1.51
7.	South Africa	75.00	10,094,393.38	1.09
8.	U n i t e d Kingdom	48.20	6,751,737.66	0.70
9.	Qatar	38.18	4,308,418.97	0.56
10.	Canada	0.08	11,966.94	0.00
Total		6,875.56	625,752,697.70	100.00

Source: AFA - Food Crops Directorate.

Table 38: Export Volume (MT) and Value (KES million) for April to June, 2025

S/No.	Crop	April		May		June		Total	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
1.	Maize	75.17	6.56	36.06	3.53	41.30	4.01	152.54	14.10
2.	Wheat	0.17	0.002	1.92	0.15			2.09	0.15
3.	Rice	3.90	1.40	9.72	2.74	17.22	1.17	30.83	5.31
4.	Beans	1,198.90	146.43	562.88	62.87	290.00	33.60	2,051.78	242.90
5.	Irish Po- tato	101.07	5.51	23.54	2.53	5.37	6.34	129.99	14.37
6.	Green Gram	255.56	20.40	50.00	6.73	6,570.00	598.63	6,875.56	625.75

Source: AFA - Food Crops Directorate.

Table 39: Comparison of Export Volumes For April To June, 2024 Versus 2025 In (MT) Crops

Crops	April		May		June		Total Vol- ume 2024	Total Vol- ume 2025
	2024	2025	2024	2025	2024	2025		
Maize	20.08	75.17	0.37	36.06	3.81	41.30	24.26	152.54
Wheat	0	0.17	25.00	1.92	0	0	25.00	2.09
Rice	0.50	3.90	29.30	9.72	60.96	17.22	90.76	30.83
Beans	1,896.00	1,198.90	1,111.88	562.88	1,470.01	290.00	4,477.89	2,051.78
Irish Pota- toes	69.76	101.07	52.31	23.54	49.02	5.37	171.09	129.99
Green Grams	1,971.54	255.56	1,084.71	50.00	359.30	6,570.00	3,415.54	6,875.56

Source: AFA - Food Crops Directorate.

6.0. Horticultural Crops Performance

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Introduction

Kenya's horticulture sector encompassing flowers, fruits, vegetables and medicinal & aromatic plants (MAPs) continues to be a major foreign exchange earner and employment source. The country is actively seeking new international markets, participating in trade fairs and promoting value addition and organic products to enhance export competitiveness.

6.1. Quarterly Highlights

- In the quarter under review horticultural exports rose by 18 percent in volume to 130,568 MT worth KES 50.55 billion, up from 110,728 MT worth KES 32.76 billion in 2024.
- Flowers exports were 32,463 MT in volume worth KES 25.46B (50 percent of the total value).
- Fruits exports were 76,432 MT in volume worth KES 18.86B (37 percent of the total value).
- Vegetables exports: 16,208 MT worth KES 4.56B (6 percent of the total value).
- Imports continue to fall sharply, aligning with Kenya's export-driven strategy. In the quarter under review horticulture imports dropped to 14,077.82 MT in volume worth KES 1.89 billion (down from 45,017.79 MT worth KES 4.55 billion in 2024).

6.2. Horticultural Exports

6.2.1. Volumes and Values

Horticultural exports in Q4 (April–June 2025) grew by 18 percent in volume from 110,276 MT in 2024 to 130,568 MT and by 53 percent in value from KES 32.75 billion in 2024 to KES 50.21 billion, reflecting not only higher production but

also improved market prices. A steep growth occurred in April 2025, where export earnings nearly doubled at KES 23.06 billion compared to the same period in 2024 at KES 12.01 billion, suggesting favorable international demand conditions and possibly premium prices for early-season exports. For more details, refer to Table 40.



Table 40: Monthly Horticulture Export by Volume and Value April-June, 2024- 2025

Month	2024		2025	
	Volume (MT)	Value (KES) million	Volume (MT)	Value (KES) million
April	40,866.62	12,018.13	4,106.66	23,066.71
May	34,656.01	10,662.46	45,102.68	14,473.49
June	35,202.47	10,078.73	41,385.07	12,672.09
Total	110,725.1	32,759.32	130,594.41	50,212.29

Source: AFA–Horticultural Crops Directorate

*Provisional

6.2.2. Horticultural Export by Crop Category

In the quarter under review horticultural exports grew by 18 percent in volume from 110,728 MT in 2024 to 130,598 MT and 54 percent in value from KES 32.78 billion in 2024 to KES 50.54. The rise was attributed to flowers exports, which strengthened their dominance, accounting for half of total export earnings in 2025. The surge in flower exports by value reflects favorable international demand, particularly in premium markets and possibly improved logistics or pricing power.

and 3 percent respectively of the total export value.

Overall, the data suggests that flowers remain Kenya's key driver of export earnings, while fruits are emerging as strong contributors, and vegetables face pricing pressures despite higher output. For more details, refer to Table 41.

Fruits maintained a stable share of total export value at 37 percent (KES 18.88 billion) followed by vegetables and MAPs representing 6 percent

Table 41: Fresh Horticultural Produce Exports 2024-2025 (Apr-June)

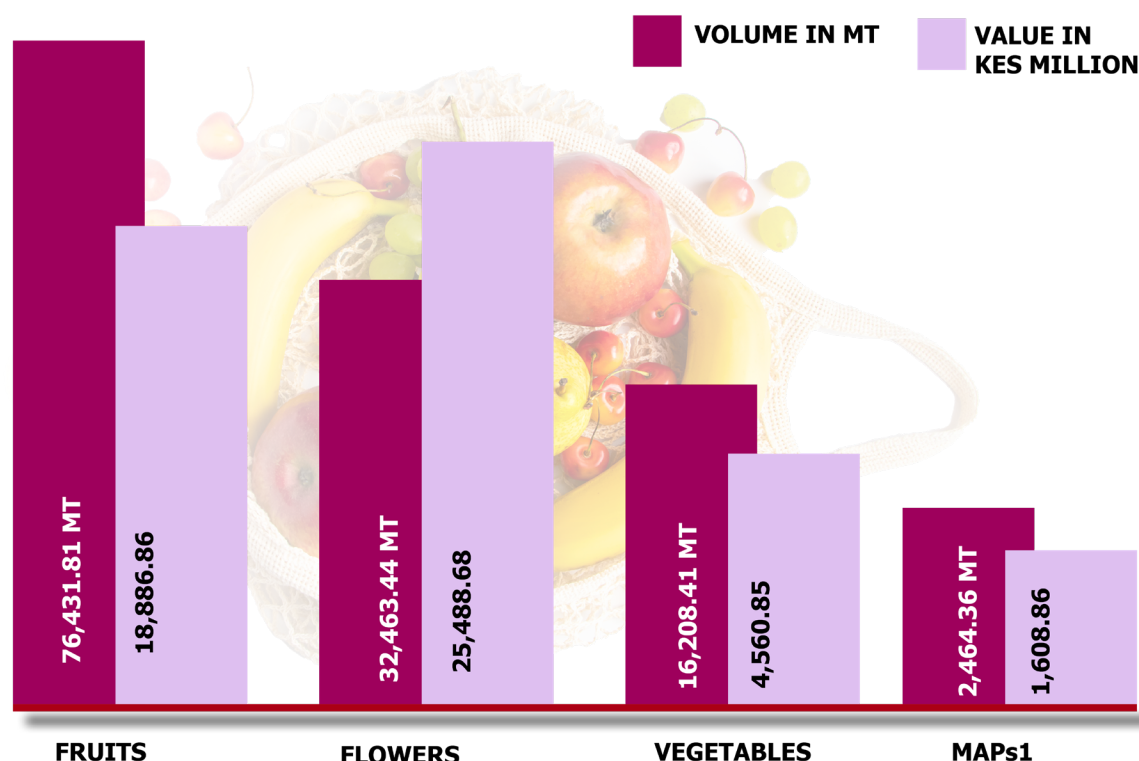
Product	2024			2025		
	MT	Value (KES) million	% of Total Value	MT	Value (KES) million	% of Total Value
Flowers	24,408.63	15,641.20	48	32,463.44	25,488.68	50
Fruits	72,124.86	12,463.11	38	76,431.81	18,886.86	37
Vegetables	12,221.34	3,601.08	11	16,208.41	4,560.85	6
MAPs ¹	1,673.30	1,083.62	3	2,464.36	1,608.86	3
Total	110,728.43	32,789.32	100	130,598.02	50,545.29	100

Source: AFA–Horticultural Crops Directorate

¹ Medicinal and Aromatic Plants (Herbs & Spices)

*Provisional

FRESH HORTICULTURAL EXPORTS 2025



6.2.3. Horticultural Exports by Country of Destination

The total number of export destinations in the quarter under review were 128 in 2025 compared to 116 in 2024 in the similar period. There was an overall growth in value by 48 percent in the quarter under review from KES 34.08 billion in 2024 to KES 50.54 billion. The export volumes also surged from 110,728 MT in April-June 2024 to 130,568 MT in April-June 2025. The growth in value was observed in all the top 20 markets while the fastest growing markets for Kenya's horticulture in this quarter under review were Mexico and Portugal.

The Netherlands was the top destination denoting 29.2 percent of the total value exported followed by UK (10.5 percent), UAE (7.6 percent), Spain (6.2 percent) and Germany (5.5 percent). Barbados emerged 6th in the quarter under review dropping from 4th position in similar period last year despite increased export value from KES 2.3 billion in 2024 to KES 2.6 billion.

The emergence of Mexico, Portugal and China in the top 20 to displace Onan, Monaco and United States is an indication of growth potential in non-traditional markets.

Flowers are the main market drivers in Netherlands, UK, Germany, Kazakhstan, Saudi Arabia and UAE. The UAE is the most significant Mangoes Importer while more avocados are Exported to the Netherlands and Barbados, a Latin America based country absorbed most processed pineapples products giving her a competitive edge over other traditional markets. For more details, refer to Table 42.

Table 42: Top 20 Export Destinations By Volume And Value April To June, 2024 - 2025

S/No	Destination	2024			Destination	2025			% Growth/Loss
		Volume (MT)	Value (KES) million	% of Total Value		Volume (MT)	Value (KES) million	% of Total Value	
1	Netherlands	26,016.06	11,668.86	34.2	Netherlands	26,862.76	14,772.72	26.2	+27
2	UK	12,260.14	4,575.41	13.4	UK	10,548.47	5,307.62	10.5	+16
3	UAE	13,372.74	2,516.18	7.4	UAE	15,636.28	3,846.26	7.6	+53
4	Barbados	6,666.15	2,272.36	6.7	Spain	8,643.64	3,110.38	6.2	+155
5	France	6,307.73	2,216.63	6.5	Germany	8,068.58	2,768.46	5.5	+36
6	Germany	6,111.36	2,053.41	6	Barbados	10,386.68	2,546.31	5	+12
7	Saudi Arabia	4,777.87	1,247.06	3.7	France	11,355.26	2,484.78	4.6	+12
8	Spain	6,314.86	1,222.10	3.6	Saudi Arabia	5,220.57	1,826.05	3.6	+47
6	Kazakhstan	686.81	706.81	2.1	Kazakhstan	1,277.32	1,545.66	3.1	+118
10	Norway	625.06	611.64	1.8	Mexico	1,160.60	1,400.81	2.8	z+
11	Turkey	3,170.35	467.64	1.4	Norway	1,502.13	1,142.68	2.3	+87
12	Italy	865.74	385.46	1.1	Italy	2,187.13	1,030.64	2	+167
13	Qatar	1,068.60	355.56	1	Portugal	1,017.41	747.68	1.5	+1381
14	Switzerland	470.4	280.32	0.8	Turkey	3,438.15	668.37	1.3	+43
15	Australia	246.27	238.66	0.7	Switzerland	1,081.11	661.56	1.3	+136
16	Belgium	640.75	202.61	0.6	Australia	530.34	526.67	1	+121
17	Kuwait	810.64	173.27	0.5	Qatar	1,652.82	442.61	0.6	+25
18	Onan	835.18	168.64	0.5	China	1,871.65	401.35	0.8	+99
16	Monaco	708.74	160.25	0.5	Belgium	1,663.83	356.22	0.7	+77
20	U.S. A	88.82	106.24	0.3	Kuwait	1,456.55	373.42	0.7	+116
	Others	6,350.45	2,448.52	7.2	Others	15,000.11	4,544.45	6	+86
Total		110,728.43	34,081.96	100	Total	130,598.02	50,545.29	100	+48

Z+: means export value was zero in the previous period Source: AFA-Horticultural Crops Directorate

*Provisional

6.3. Horticultural Imports

6.3.1. Volumes and Values

Despite being a producer of a wide range of flower, fruits, vegetables, MAPs products, Importing the same into Kenya is essential for maintaining a diversity and year-round supply of fresh produce during low supply periods. In the quarter under review, the total Imports volume declined from 45,017.79 MT in 2024 to 14,077.82 MT. Similarly, the values decreased from KES 4.55 billion in 2024 to KES 1.89 billion in the same period in 2025. Several factors may also come into play like customs declarations using non-horticultural HS Codes, informal border trade among others. For more details, refer to Table 43.




Table 43: Monthly Horticulture Imports By Volume And Value April-June, 2024-2025


Month	2024		2025*	
	Volume (MT)	Value (KES) million	Volume (MT)	Value (KES) million
April	11,867.52	1,027.74	4,401.40	601.21
May	16,106.06	2,266.00	5,850.78	662.76
June	17,044.21	1,263.45	3,825.64	626.08
Total	45,017.79	4,557.20	14,077.82	1,890.05

Source: AFA–Horticultural Crops Directorate

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